# Chapter IX:  View Documentation

**Table of Contents**

## *Documents Tab Overview*

You maintain and review patient care documentation in the **Documents** chart section. You also can access the document entry function.

The right side is the **Display** window where documents are identified and read. The left side is the **View Control Panel** which controls what appears in the display.

Most documents are displayed by department. Advance Directives, patient education and discharge planning documents, however, all display in separate headers.

## *Documents Chart Section*

You can quickly retrieve and view documents, and filter the documents you want to see. You can also set personal preferences for viewing documents.

The **Display** window is where the documents appear, either in **Report** format - a hierarchical tree structure with the documents listed below their category and item names, or in **Summary** format – a grid format with the categories and documents down the left side and the dates across the top.

The **View Control Panel or Filters**, on the left side of the screen, allows you to select your criteria for displaying documents, including the display format.
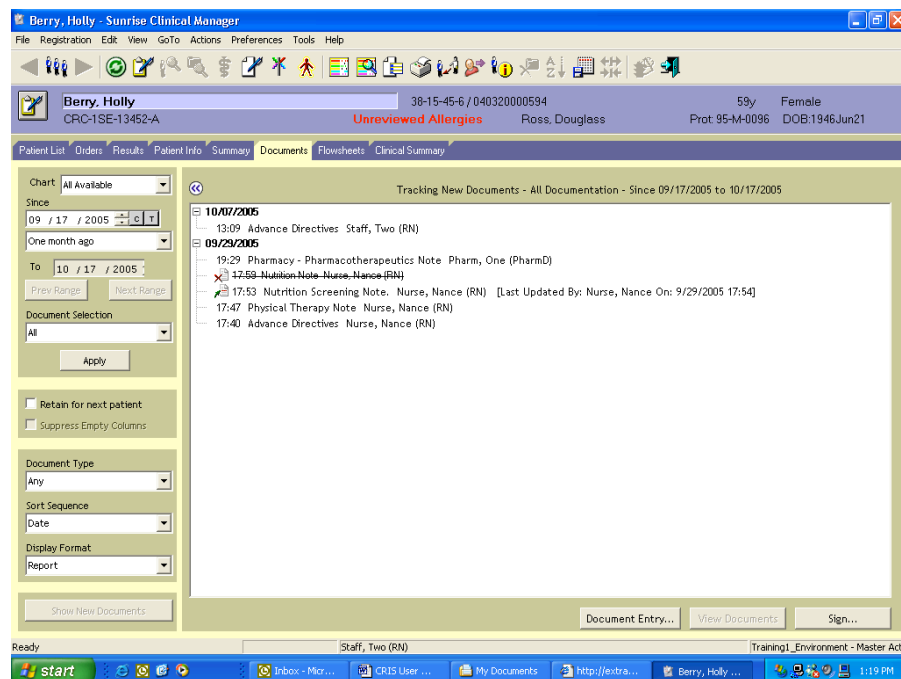


**Screen 9.1:  Documents Tab**

In the **Report** display format, the **Function** buttons on the bottom of the screen are enabled :
- **Document Entry button -** Opens the **Document Entry Worksheet**, where you can enter documents for the selected patient.
- **View Documents button–** Opens the **Document Details** dialog window, where you can view the contents of the document(s).
- **Sign button -** Opens **Signature Manager** where you can sign any unsigned documents. This option is currently unavailable

## *Documents Tab Filters*

**Definitions**
- **Chart**: **All Available** refers to all information for all visits. **This Chart** is limited to this visit.
- **Since**: Used to specify the beginning of the date range for viewing Documents.

- **Document Selection**: This option lets you specify the type of documents you want to view. You can change the default to specify particular document categories.

- **Apply**: Click to apply the changes you made in the **Chart**, **Since**, and **Document Selection** sections.

- **Display Format:** This option allows you to view documents as either a list (**Report**) or grid (**Summary**).


**Apply filters**
**How to view documents**
- The current chart only
   1. In the **Chart** drop-down list on the View Control Panel, select **This Chart**.
- All available charts
   1. In the **Chart** drop-down list on the View Control Panel, select **All Available**.

**How to select the date range for viewing Documents**
1. In the **Since** group box, do one of the following to provide a **Since** date:
   a. In the **Date** field, enter a specific date.
   b. Use the increase/decrease arrows to change the date one day, month, or year at a time.
   c. Click the calendar arrow and select a date. Select the day after you have selected the month and year.
   d. Select a pre-defined option from the drop-down list, such as Start of This Chart.

e.  Select the T (for today) button and then type in T plus or minus the number of days you wish to view and press Enter on your keyboard. For example, T-3 would yield a calendar date of 3 days ago.

## How to view particular types of Documents:

1.  In the **Document Selection** drop-down list on the View Control Panel, select the desired filter (such as Nursing, Nutrition, or Social Work).
2.  In the Document Type drop down list select the type of document you want to view
    a.  **Any**: displays all documents
    b.  **Incomplete** Documents:  displays only those documents which have been marked incomplete by their author
    c.  **Results Pending**: displays only those documents where the author has marked that results are pending
    d.  **Priority** Documents:  displays those documents which the author has designated as priority
    e.  **Internal** Documents, and Phone Notes are not used at this time

## How to select a sequence to sort the documents for viewing

1.  The default **Sort Sequence** is **Review Category, Document**:  The category the document belongs to followed by the document name.
2.  You could also choose to sort by
    a.  Author:  Who wrote the document
    b.  Date:  When the document was authored, meaning when the data was collected, not when it was entered into CRIS
    c.  Discipline:  The discipline to which the document belongs

## How to select the display format

• **Report** View **-** Displays documents sorted by review category, then by document. Clicking the Expand icon to the left of the category displays the entries, in ascending order, under the document name.
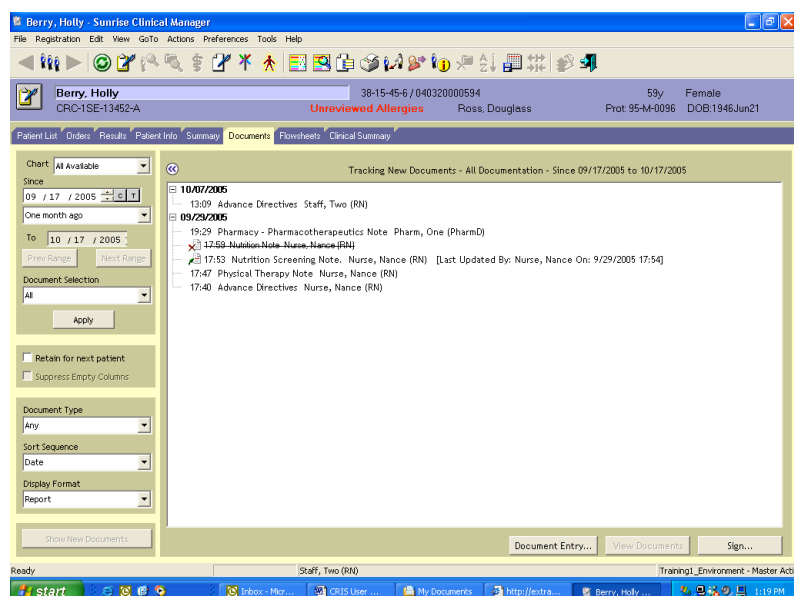
**Screen 9.2:  Document Report View**

**Summary View**

The **Summary** view displays a grid showing whether or not documents exist for the patient on a particular day, week, month, or year.  You can select documents you want to display by double-clicking on a single cell in the grid, or on a row or column header to display all the documents in that row or column.

1.  A black check mark indicates a document for that date and category
2.  A red check mark indicates a document that has been marked as **Incomplete, Priority**, or **Results Pending**
3.  In order to display only those columns containing documents, check the **Suppress Empty Columns** box on the control panel
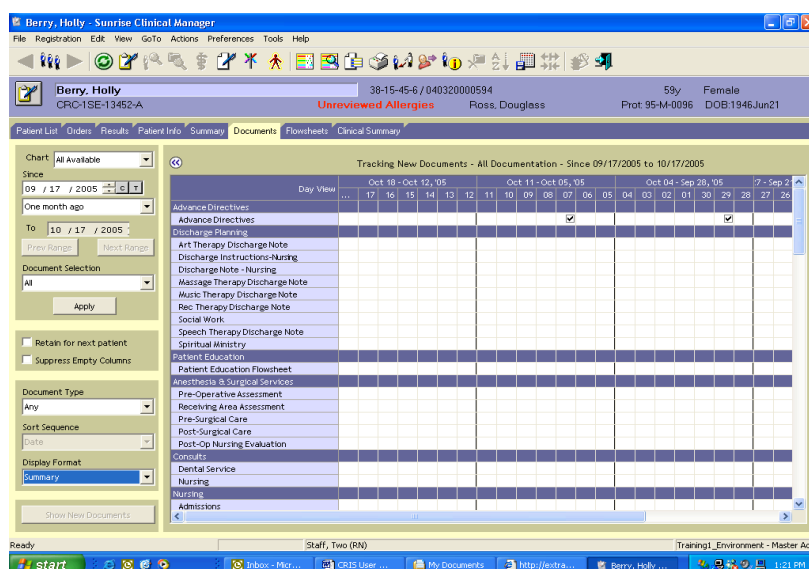

**Screen 9.3:  Document Summary View**

**Show New Documents**

Select the **Show New Documents** to view only the documents which have been entered since you last viewed the documents entered for the patient selected.

**Remove Filter**

Once a filter is applied, you can remove it or change to another filter.  If a filter has been applied, you will see a filter icon ▣ at the top of the display window.

## *View Document Details*

You can view document details in one of the following ways:

- In the Report view, highlight and right-click on a document and select View Document Details.
- In the Report view, click the View Documents button at the bottom of the page.
- In either Report view or Summary view, double click on a document or cell to view the Document Details

A separate window called **Document Details** will open where you can view the contents of the submitted document.  When you are finished reading, click close.
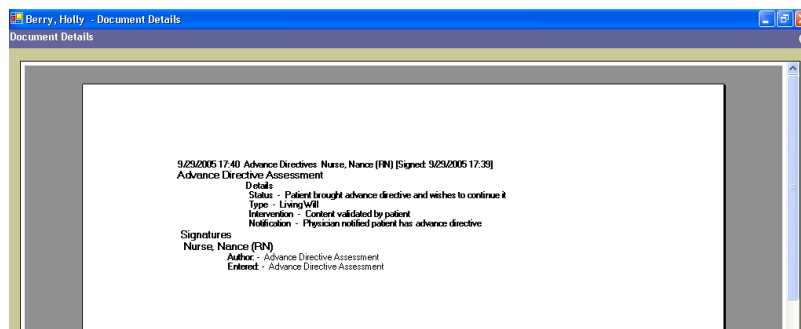


**Screen 9.4:  View Document Details window**

To view all documents and details  for a given date:
1. While in the **Report** view, select the **Sort Sequence** of **Date**.
2. Highlight the desired date and double click, or highlight the date and select the View Documents button.

The Document Details window will open.  Scroll down to view all documents for that date.

## View Corrected Documents

You can view documents that have been corrected – both the original documentation and the corrected documentation.

**To view corrected documents**
1. In **Report** view, select the document for which you want to see the edits.
2. Right-click on the document and select **View Corrections** from the shortcut menu. The **Documentation Corrections** dialog box opens in view mode; you can view the information, but not edit it. A red C displays where information has been edited.
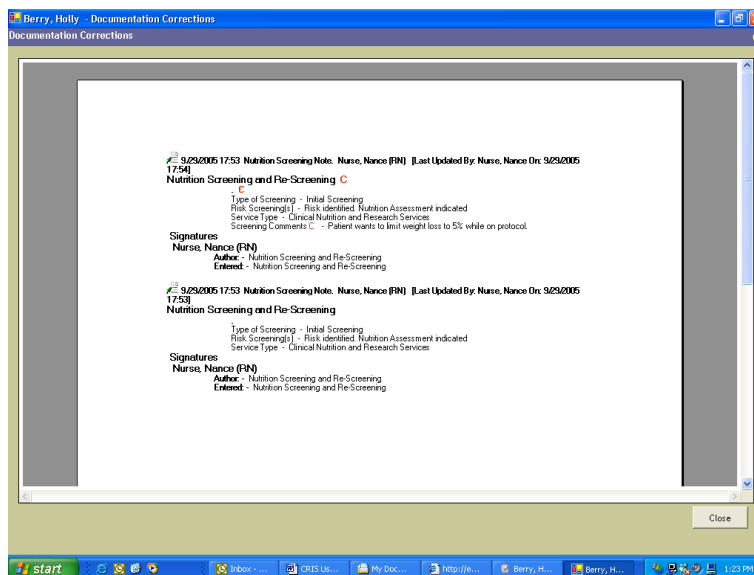


**Screen 9.5:  Document Corrections window**

## View Status History of a Document

You use the **Document Status History** dialog box to see the status changes a document has gone through.

**To view the status history of a document:**
1. In **Report** view in the **Documents** chart section, select the document for which you want to view the status history.
2. Right click on the document and from the shortcut menu, select **Status History**.

**Screen 9.6:  Document Status History window**

## *Personalizing Your Document Tab View*

### Change and save time scale for viewing Documents

You can change the time scale for the dates in the **Summary View** on a per-patient basis. There are up to four options:
- Days
- Weeks
- Months
- Years

**Note:** Depending on the date specified in the **Since** field, some of the selections in the **Actions** menu may be disabled.

### How to change the time scale

1. Display the **Documents** chart section.
2. In the View Control Panel, select **Summary** from the **Display Format** list.
3. In the **Since** group box, select or enter how far back you want to display Documents.
4. From the **Actions** menu, on the tool bar at the top of the screen select the time interval you want to use i.e. View by week interval, View by month interval, or View by year interval. You can save the time scale for viewing a patient's Documents in the **Summary** view of the **Documents** chart section. The time scale remains as you have selected for that patient, until you select and save a different interval.

### How to save the current time scale

1. Do one of the following:

   a.  Click the **Save Time Scale** icon [icon] on the toolbar.
   b.  From the Preferences menu, select **Save Time Scale**.
2.  The Save Time Scale icon displays at the top left corner of the Display
    window to indicate that you have saved a time scale.


**Creating a temporary document selection filter**

The **Temporary Document Selection** dialog box allows you to select
Documents to be displayed on a one-time or temporary basis. This filter is
cleared and not saved after you log off or select another filter.

To create a temporary selection filter:
1.  From the **Document Section** filter, select **<Temporary Selection...>** and
    click **Apply.** The **Temporary Document Selection** window displays.
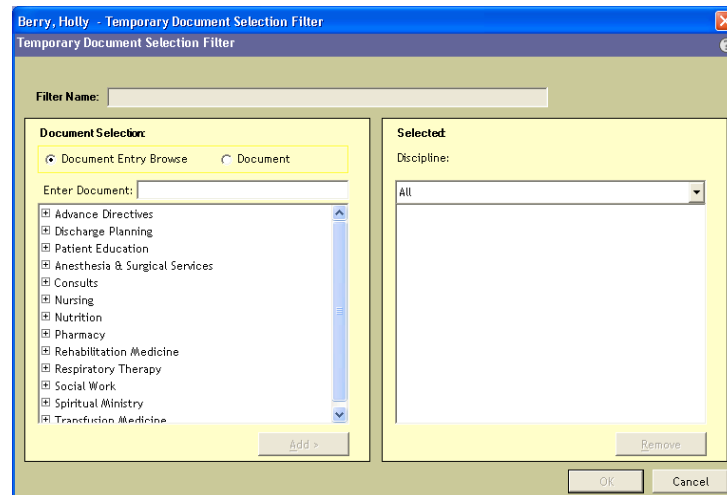


**Screen 9.7: Temporary Document Selection Window**

2.  Locate either the individual documents or documentation category you want
    to include from the **Document Types** window and click **Add**
3.  The group or document you want to include displays in the **Selected** list.
4.  You can remove a document from the **Selected** list by highlighting it and
    clicking **Remove**
5.  When you have selected all the documents you wish to review, click **OK.**
    **The documents you specified will be shown in the display window**


**Setting Preferences for Viewing Documents**

The **Personal Documents View Options** dialog box allows you to set up
customized, personal preferences for the **Documents** chart section. By setting
your preferences, you can see the information important to you in the
**Documents** chart section. The three tabs in this dialog box allow you to:

- Create and maintain filters for the types of Documents you want to view (**Document Selection** tab).
- Specify the default display format for the chart section (**Display Format** tab).
- Specify the order in which you want documents listed in the chart section (**Sort Sequence** tab)

### Documents Selection Tab

The **Document Selection** tab of the **Personal Documents View Options** dialog box displays the current Document selection filters. In this dialog box, you can add, change, or delete filters, and choose a default filter for when you display the **Documents** chart section. You can create a new filter and make it the default, or you can make an existing filter the default.
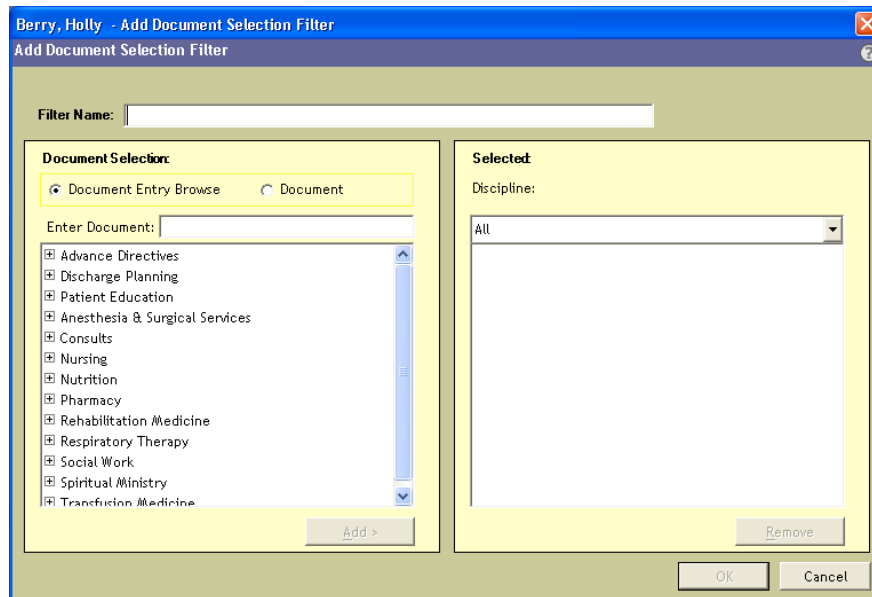
### How to add a Document Selection filter

1. Select the **Documents tab** in order for the Document Review selection to be activated on the Preference menu.
2. From the **Preferences** menu, select **Document Review**. The **Document Preferences** dialog box opens.
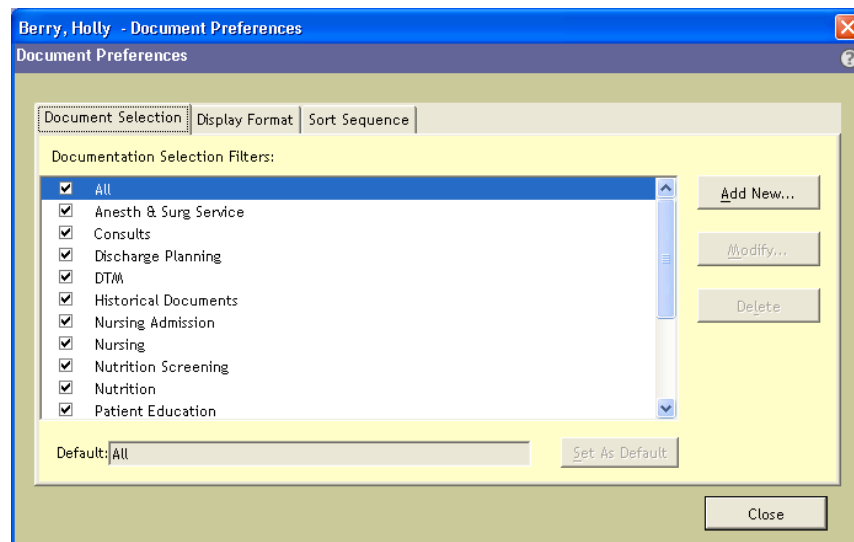


**Screen 9.8:  Personal Documentation View Options dialog box**

3. Click the **Document Selection** tab.
4. To create a new filter, click **Add New**. The **Add Document Selection Filter** dialog box opens.

**Screen 9.9:  Document Selection Filter dialog box**

5.  Type a name for your new Documents filter in the **Filter Name** field.
6.  In the **Document Selection** group box, do one of the following:
    a.  Click on the **Document Entry Browse radio button**. The **Browse** shows a tree structure of Document groups and items. Select the group or item you want included in the filter. To select sequential groups or items, hold down Shift and click on each choice. To select non-sequential groups or items, hold down Ctrl and click on each choice.
    b.  Click on the **Document Item button**. Enter part or the entire name of the item you want to include in the filter. When you enter part of the name and pause, an alphabetical list of items that begin with the characters you entered displays in the browse window.
7.  Select a category or item and click **Add** to place the selected item(s) in the **Selected** list. To delete any groups or items from the **Selected** list, select the category or item and click **Remove**.
8.  Click **OK** to return to the **Document Selection** tab.
9.  If you want to make the new filter the default, click **Set as Default**.
10. Click **Close** to save the filter and return to the **Documents** chart section. The new filter appears in the **Document Selection** drop-down list in the **View Control Panel**.  If you selected the filter as the default, it will be used the next time you log on and display the **Document** chart section.

**How to change the Display Format filter**

1.  From the **Document Preferences** dialog box, select the **Display Format** tab.
2.  Select **Report** from the format list

3. Select whether you want to sort documents in **Chronological** or **Reverse Chronological** order.
4. Click **Set as Default**
5. Click **Close**

**How to change the Sort Sequence filter**

1. From the **Personal Documentation View Options** dialog box, select the **Sort Sequence** tab
2. Select the sequence you want as the default
3. Click **Set as Default**
4. Click **Close**

## Flowsheet Tab Overview

The **Flowsheet** tab is the recommended method to view flowsheets and the observations that are contained in them. You can also view flowsheets from the **Documents** tab but they will not display in a grid like format which allows for easy comparison of trended data over time.

The Flowsheet chart section is comprised of **Filters** and a **Display** window. Observations can be viewed in three **Layout Views** chosen from the left side of the **Filters** and four **Display Views** selected from the bottom of the **Display** window.
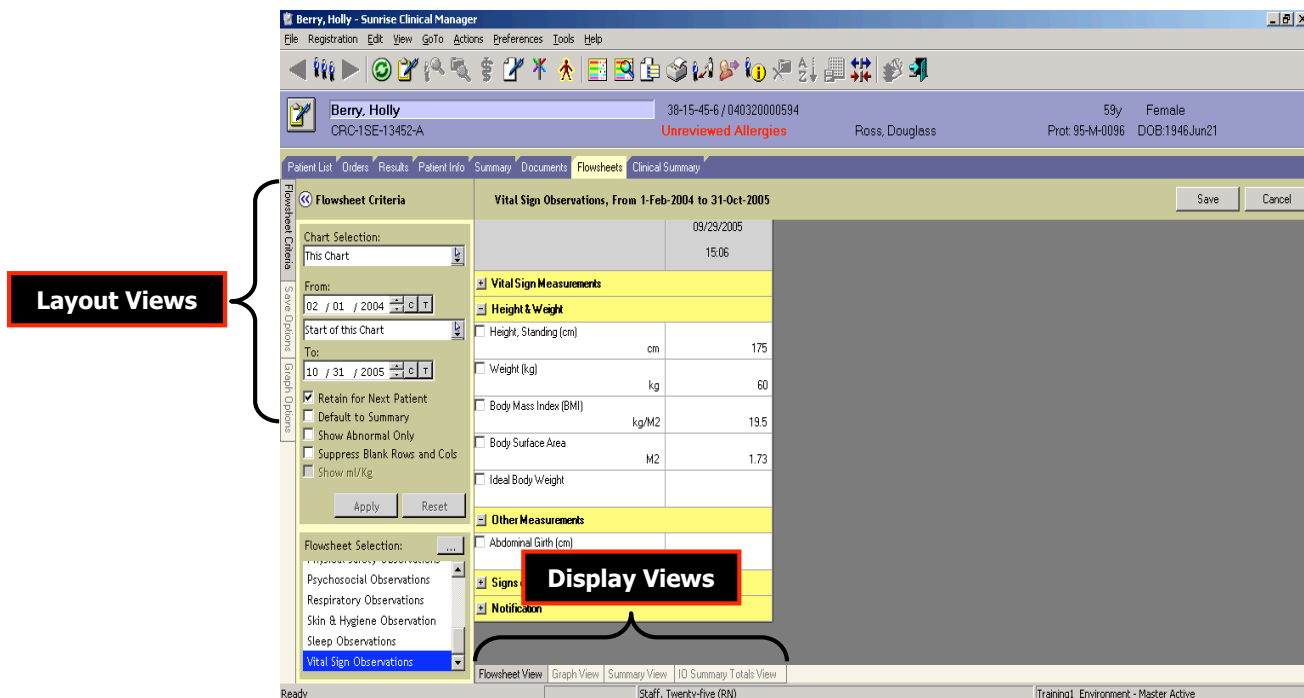


Screen 9.10:  Flowsheets tab

**Display Views**

The **Filters**, to the left of the **Display** window, are where you set your criteria for displaying observations. The controls available to you will vary depending on the **Display View** you are using.

The **Display** window displays observations in the form of numbers, text, and graphs, based on the type of observation and the display format you select. The **Display View** options include **Flowsheet View**, **Graph View**, **Summary View**, and **IO Summary Totals View.**

**Flowsheet View**

Observation parameters are displayed in a grid or spreadsheet format called Trend View. Each column of the flowsheet represents a specific date and time. The most recent data is on the right.

> In this view you can
> - Modify the flowsheet
> - Enter data on any observation cell
> - Edit and view corrected data on any observation cell
> - Compress/expand headers
> - Suppress blank rows and columns

The **Flowsheet Criteria** tab on the View Control Panel controls how the data in this view is presented.

**Graph View**

Parameters selected via checkboxes on the **Flowsheet View** are displayed in graph format with a legend showing the symbols used when the **Graph View** tab at the bottom of the Display Window is selected. Up to six items from a flowsheet may be graphed at one time. You can click on a data point on the graph and the exact data will appear in a separate window.

You can customize the **Graph View** using the **Graph Options** tab on the **View Control Panel**.

**Summary View**

An expanded flowsheet currently displays in this view. Summary views of flowsheet content will not be configured until a future update.

**IO Summary Totals View**

This view is only applicable to Intake and Output flowsheets. It displays a summary view of Intake and Output information by category headings.

**Layout View Filters**

The **View Control Panel or Filters** is where you specify the Flowsheets you want to edit, graph, save and view, and the format in which you want to display them in the **Display** window of the **Flowsheets** chart section. **The Filter** options change as you select different tabs along the left side of the **View Control Panel.** The three Layout View Filters are the **Flowsheet Criteria** filter, the **Save Options** filter, and the **Graph Options** filter.
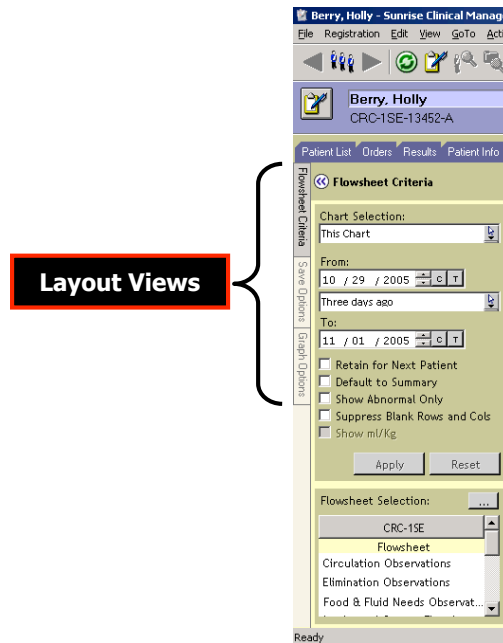


**Screen 9.11:  Flowsheets Tab Layout View Filters**
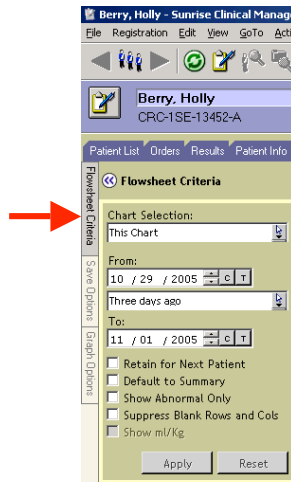
**Flowsheet Criteria Filters**

- **Chart Selection**: **All Available** refers to all information for all visits. **This Chart** is limited to this visit.

- **From**: enter the start date of the observations you want to view,  or click **C** to open a calendar from which to select the date.  Clicking **T** allows you to select a range by adding a plus or minus sign and then the number of days to derive a date.  You can also use pre-defined timeframes from the drop-down list such as one week ago or one month ago. You should not use both options at the same time.  **Note**: If a time frame is used it will change the **From** date.  If there is an end date, enter the date in the **To** field.

- **Retain for Next Patient:**  checking this box allows you to keep the current **View Control Panel** options for the next patient or flowsheet selected.

- **Suppress Blank Rows and Columns:**  selecting this box will filter out the rows and columns that contain no data.

- **Show ml/kg:** this is active only on the **Intake and Output** flowsheet and changes the display values from ml to ml/kg

- **Apply:** You must click to apply any of the changes you have made.

- **Reset:** resets the **View Control Panel** options to the previous entries if you have not yet clicked on the **Apply** button.

- **Flowsheet Selection:** Click the ellipses button to open the **Search Flowsheet** dialog box. Enter the name of a flowsheet in the search field.
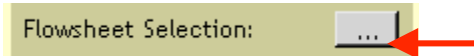


**Screen 9.12: Ellipses Button**

- **Location Button:** click to show or hide the flowsheets assigned to that location.

- **Flowsheet List:** Displays all the available flowsheets for that patient at that location for which you have view or edit rights.



**Screen 9.13: Flowsheet Criteria Tab**

**Save Options Filter**

This filter will not be available until a future release.

**Graph Options Filters**
- **Viewing Style:** you can select your viewing style from these options
  - **Color:** displays graph in color
  - **Color+3D**: displays graph in color and 3D
  - **Monochrome**: displays graph in black and white

- **Font Size:** you can select between Large, Medium, or Small size font for all screen text

- **Numeric Precision:** you can specify the rounded value of integers for data points on the graph by setting the **Numeric Precision** to none, 1 decimal, 2 decimals, or 3 decimals.

- **Plotting Method:** allows you to choose from these options
  - o **Line:** a line connects each point in a series
  - o **Spline:** a curved line connects data points
  - o **Point:** only the data points are displayed
  - o **Bar:** a vertical bar indicates each data point
  - o **Area:** shades an entire region below and between data points

- **Grid Lines:** displays the X and/or Y axis

- **Show Data Label:** displays date, time, and value of each data point

- **Mark Data Points:** displays each data point on the graph. If the **Plotting Method** indicates the points are to be plotted, this check box is always selected.

- **Graph across all flowsheets:** you can graph data across all available flowsheets

- **Since start of charts:** you can graph data across all available flowsheets

- **Apply:** applies any changes you made to the Control Panel

- **Reset:** resets the **View Control Panel** to the previous entries if you have not yet clicked on the **Apply** button.
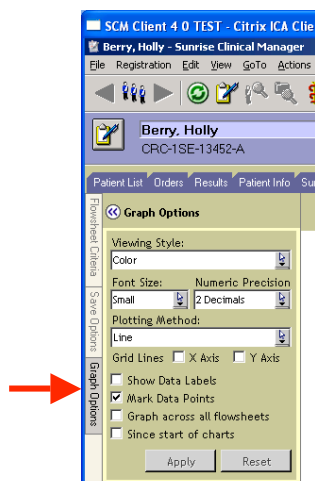


**Screen 9.14:  Graph Options Tab**

## Clinical Summary Tab Overview

The **Clinical Summary** tab displays a summary view of patient information based on a discipline and patient location. You can define specific date/time ranges, add new information such as allergies and significant events, or sort information within the Clinical Summary tab.

There are multiple views available to select from. These views have been pre-defined based on user roles (e.g. Nursing, Respiratory, Prescriber, etc...). Each view consists of pre-defined tiles. Depending on the view and the size of your screen, you may need to select the **Previous/Next** buttons in order to view all of the tiles or click the checkbox next to **Scroll** to view all tiles on one screen.



**Screen 9.15: Clinical Summary Tab Overview**

**Setting Default Views**

You can set a personalized default view so that each time you logon, the default view will automatically display.

**To set a default view:**
1. Go to the **Actions** menu
2. Select **Save Current View as User's Default**.

## Date/Time Intervals

Within each view there is a global pre-defined time range. Each individual tile may also have a specific date/time range, If an individual tile has a pre-defined date/time range, it will display to the right of the tile name.  If an individual tile has no pre-defined date/time range, it will default to the global time range for that view.
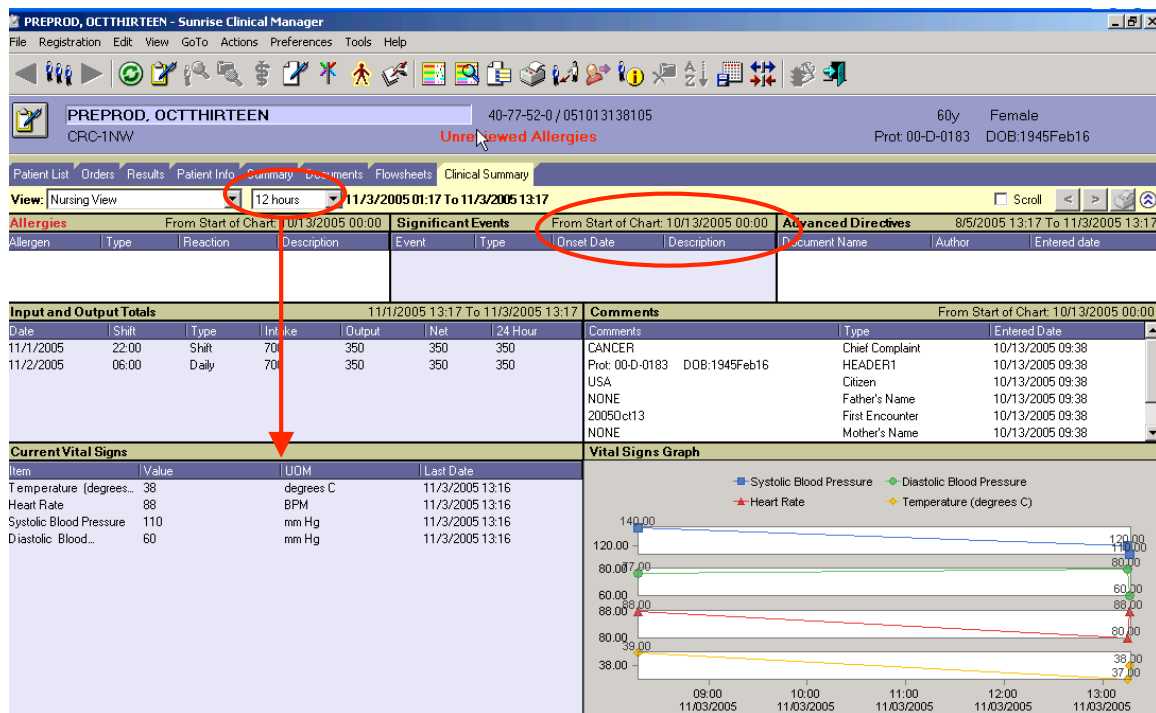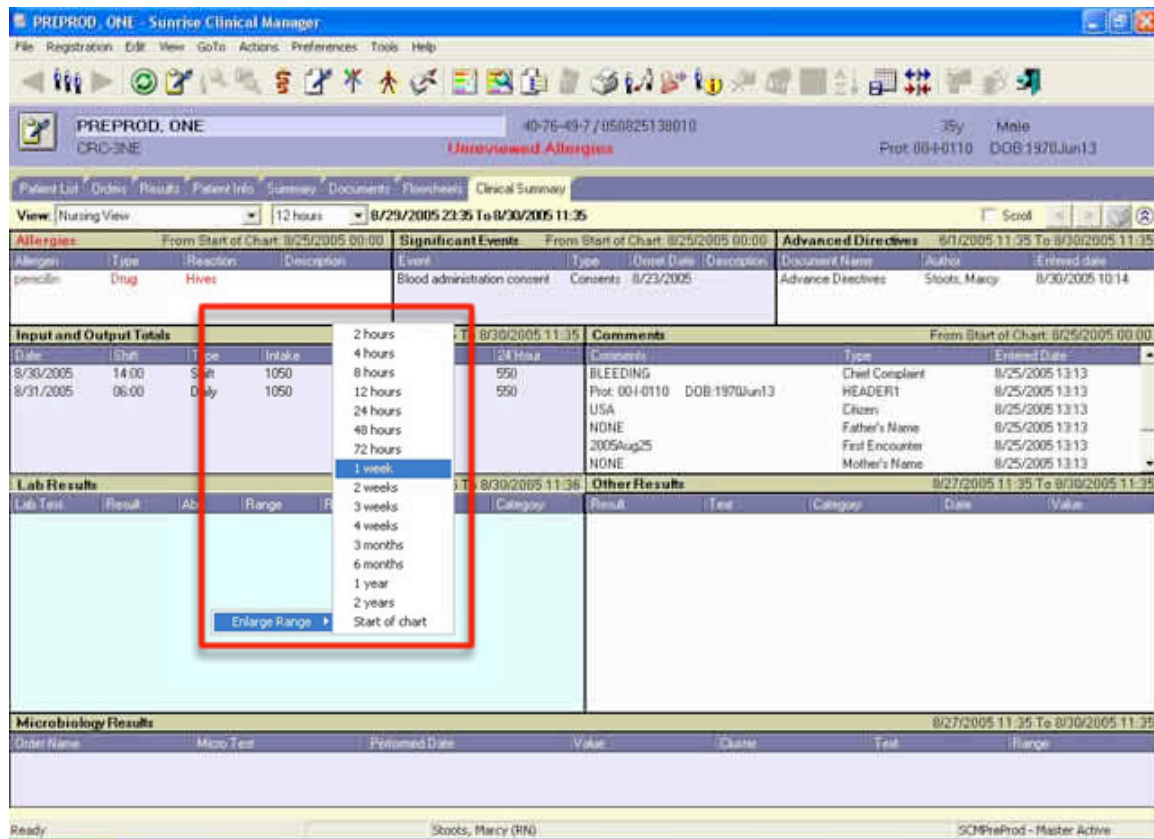


**Screen 9.16: Clinical Summary Date/Time Intervals**

Depending on the individual tile, date/time intervals can be modified.

**To modify date/time intervals:**
1. Right click in the desired tile.
2. Select **Enlarge Range** from the shortcut menu.

Modifications are **not** saved. When you refresh the **Clinical Summary** view, the system reverts to the pre-defined date/time range.

**Screen 9.17: Modifying Date/Time Intervals**

## Adding New Information

Depending on the tile and your security rights, new information such as a new allergy, significant event, or an advance directive can be added to the chart from the **Clinical Summary** tab. This information will display in the **Clinical Summary** tile as well as the appropriate section of the chart.

**To add new information to a tile:**
1. Right click in the desired tile.
2. Depending on the type of information you are adding. select **Add New** or **Document Entry** from the shortcut menu.
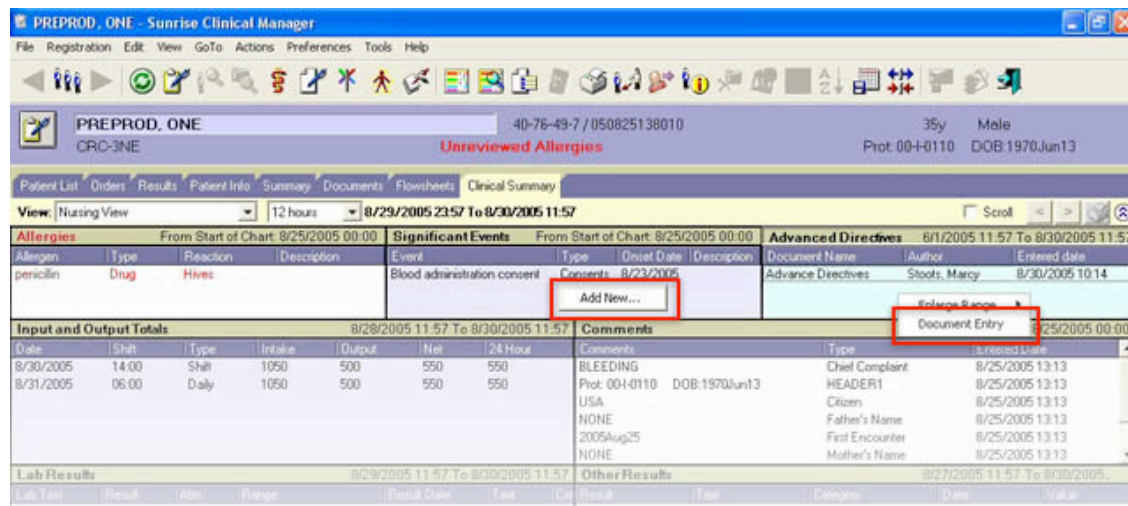
**Screen 9.18: Adding New Information**

## Sorting Columns

Information within a tile can be sorted alphabetically or in ascending or descending order.

**To sort information within a tile**:
1. Click the column heading. An upward facing arrow displays, indicating the information in the tile has been sorted in ascending alphabetical or numerical order.
2. Click the column heading again to reverse the sort.



**Screen 9.19:  Column Heading Arrow**

## Adjusting Column Widths

Column widths can be adjusted as necessary in order to view all of the information within a column.

**To adjust column widths:**
1. Place your cursor over the column edge until the cross arrows appear.
2. Hold and left click to drag the column to the desired width.



**Screen 9.20:  Adjust Column Widths**

## Growth Charts

Growth charts are a type of flowsheet and are used to view measurements such as height, weight, or head circumference in a graph-type format over time. These measurements are plotted onto a chart that also shows the distribution of these measurements for a particular population. This allows for the comparison of an individual to reference values for an entire population and are based on data from the National Center for Health Statistics (NCHS).

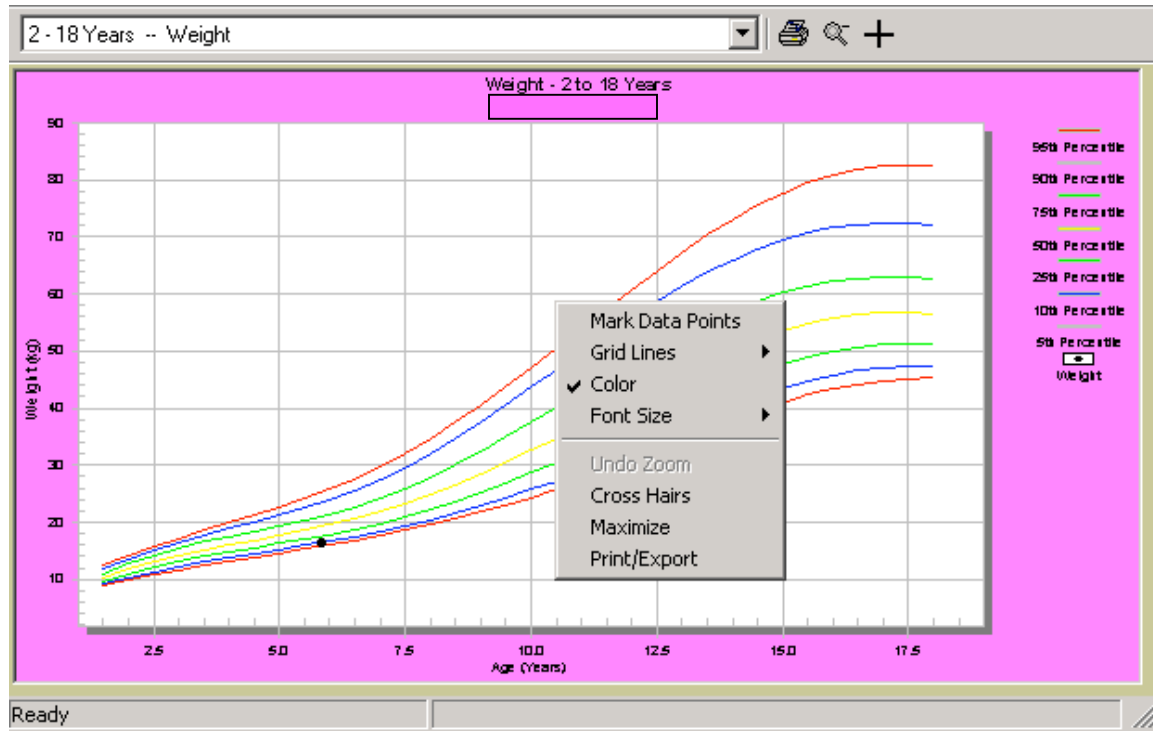**Viewing Growth Charts**

To view growth charts:

1. From the **GoTo** menu on the toolbar, select **Growth Charts**.
2. The **Growth Chart Viewer** displays.
3. Use the pull down menu to select different growth charts.
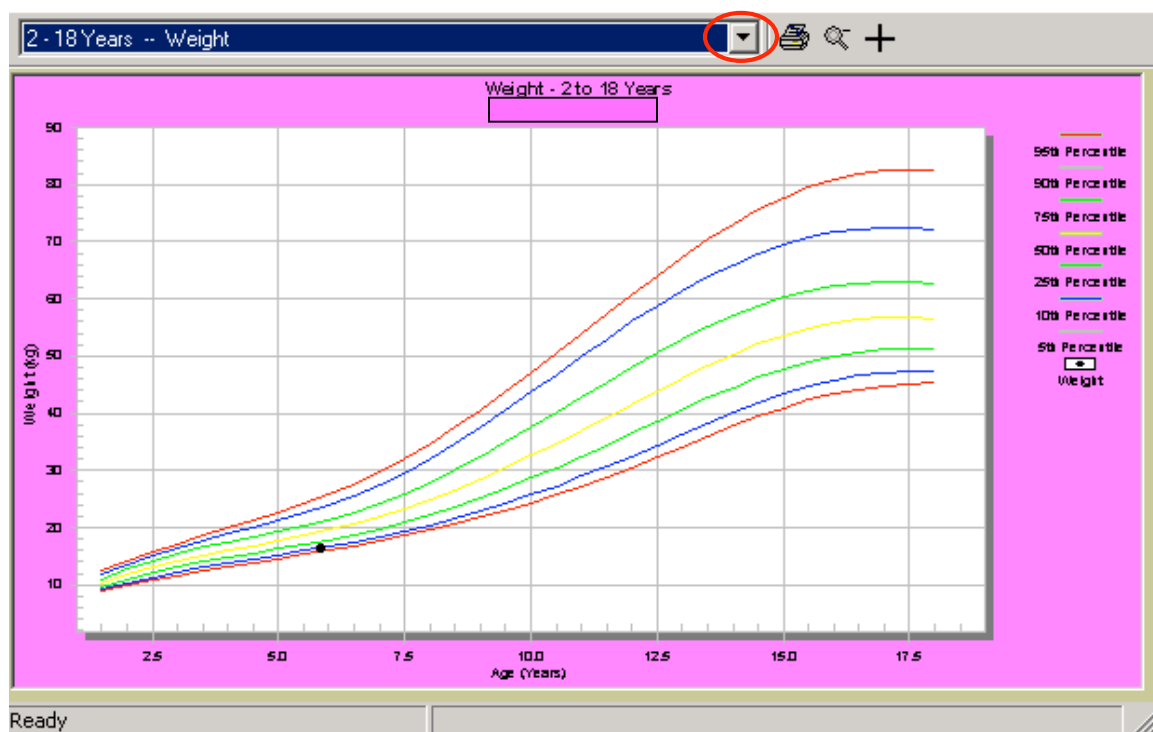


**Screen 9.21: Growth Chart Viewer**

## Customizing Growth Charts

Right click on the growth chart to see a shortcut menu. Use the shortcut menu to customize the growth chart and change **Grid Lines**, **Font Size**, or select **Cross Hairs** to see a particular numeric value for a data point.



**Screen 9.22:  Growth Chart Viewer Shortcut Menu**

## Printing Growth Charts

Click the printer icon on the **Growth Chart Viewer** to print a growth chart. At this time, growth charts will only print to a default printer and are not printable from Citrix.